

IPad, Computer, zipForm® & DocuSign

OBJECTIVE:

The goal of this class is to learn:

Learn about the cloud to sync multiple programs and devices together



What is the difference between a computer and mobile device?

Creating A Paperless Office

- I. Create a systematic filing system in the Cloud
- II. Put documents in a logical order

zipForm®

- I. Create Templates
- II. Apply templates to clients
- III. Sync to the cloud



DocuSign

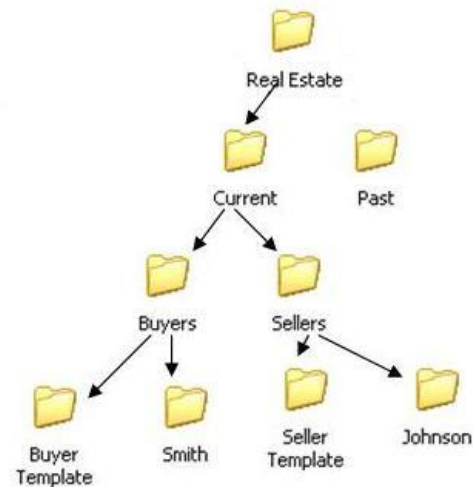
- I. Sync the computer version to the ipad version
- II. Tab non-zipForm® documents

Getting Clients Wet Sigs

- I. On the computer
- II. On the ipad

Get a Dropbox account and create a systematic filing system

Develop and use a systematic filing system on your computer for all of your documents. This is easy to do without any cost involved. This will allow you to instantly store, retrieve and send documents to anyone involved in the escrow, even after the transaction has closed. Forget about searching for files in boxes in the garage again, or worrying about keeping your documents for five years to satisfy ADRE requirements, as you will have your documents FOREVER in your computer that you can access quickly.



Sync the zipForm® versions together

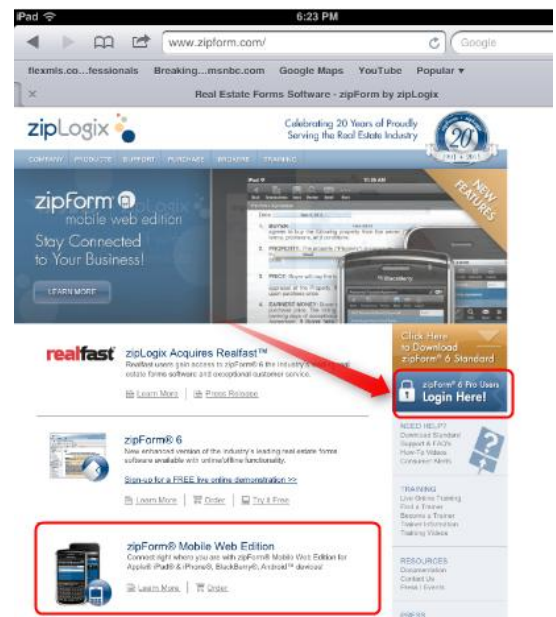
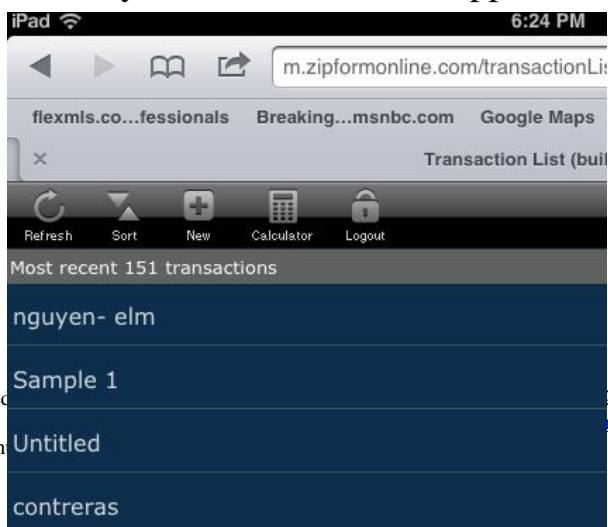
To get zipForm® on the ipad, you must purchase it from www.zipform.com for \$12.95/year. *(now an AAR member benefit as of 2014)*

Second, on your ipad (or other non-computer device), go to www.zipform.com and click on the Pro version.

You can now sign in zipForm® mobile. Once you sign in, you never have to enter your username and password again.

Working with current transactions

1. A list of your transactions will appear.



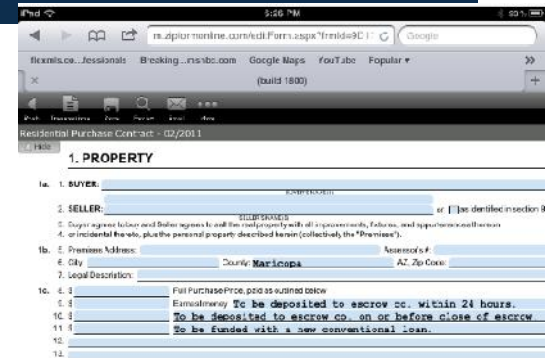
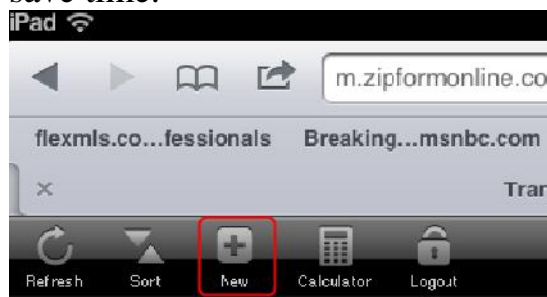
2. Then click on Edit



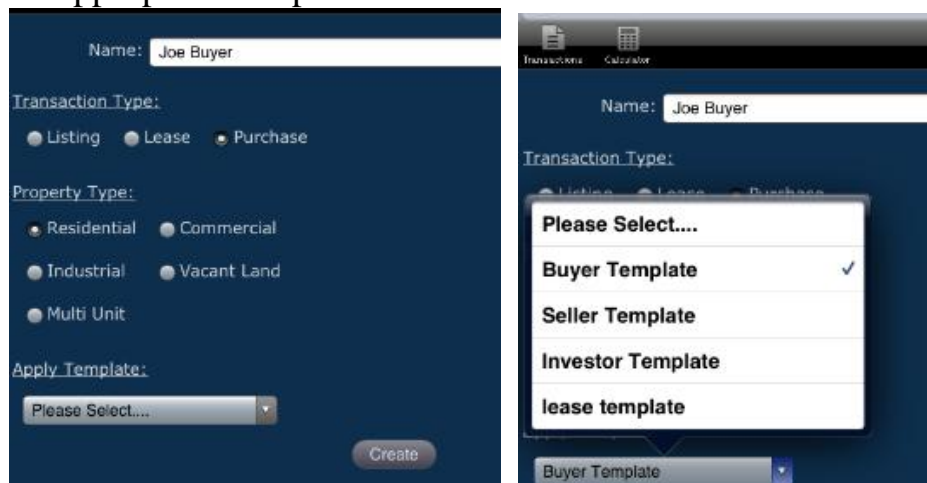
3. Start editing the documents in the fillable fields

Start a new transaction

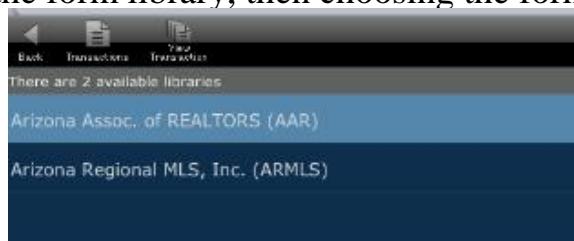
1. Start a new transaction and apply a template to save time.



2. Put in the buyer name, choose the type of transaction, and then choose the appropriate template.



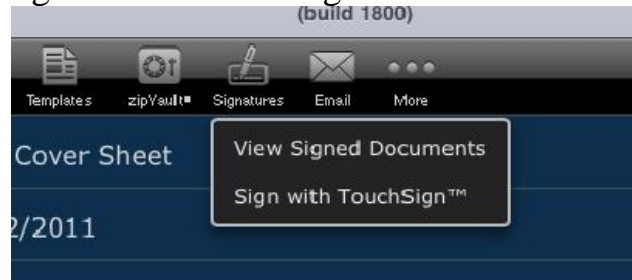
3. Add other zipForm® forms that are not in your template by choosing from the form library, then choosing the form.



Signing through zipForm® mobile

This is a great feature to sign both with “wet” sign and electronic signatures.

1. Choose the Signatures tool.
2. Choose Sign With TouchSign™



3. Choose the documents you want.
4. Put in client's name and email.

Documents	Sign?
AAR » Arizona Association Cover Sheet	NO
AAR » As Is Addendum - 02/2011	YES
AAR » Buyer Advisory - 11/2011	NO
AAR » Buyer-Broker Exclusive Employment Agreement-02/10	NO
AAR » Counter Offer #1 - 02/2011	NO
AAR » HOA Condo/Planned Community Addendum - 02/2007	NO
AAR » Real Estate Agency Disclosure and Election (Buyer) - 1/09	YES
AAR » Res. Buyer's Inspec. Notice and Seller's Response - 02/2011	NO

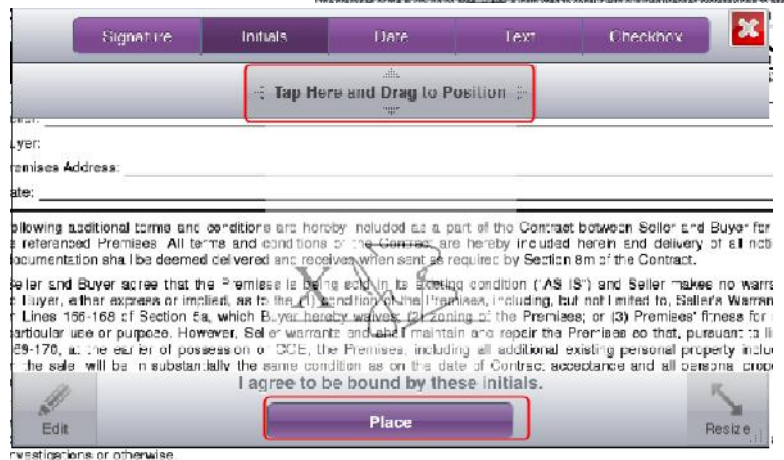
5. Agree to the use of the system.

6. SIGN!!!

- a. Resize will change the size when placing the signature or initial where you want.
- b. Generate will change it into an electronic signature.



7. Place where needed.
8. Finish



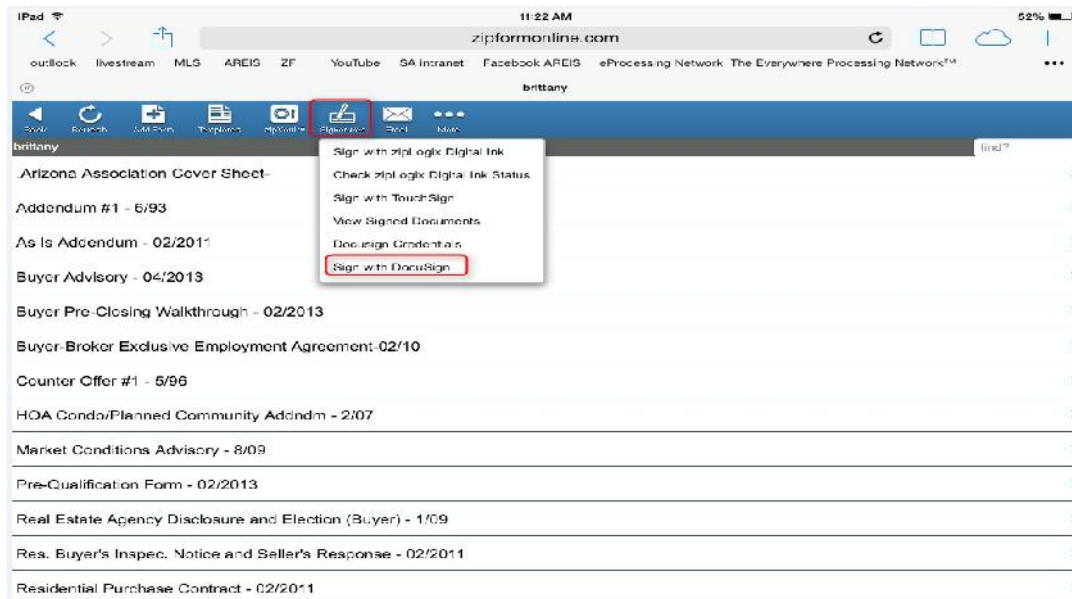
DocuSign

Through NAR, this will cost around \$216-250 per year.

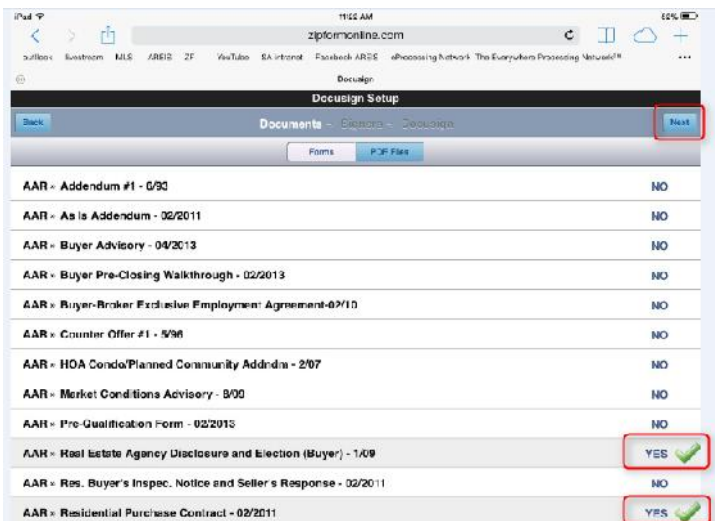
From your computer in zipForm®, go to Esign.



From your ipad, go into zipForm®, then



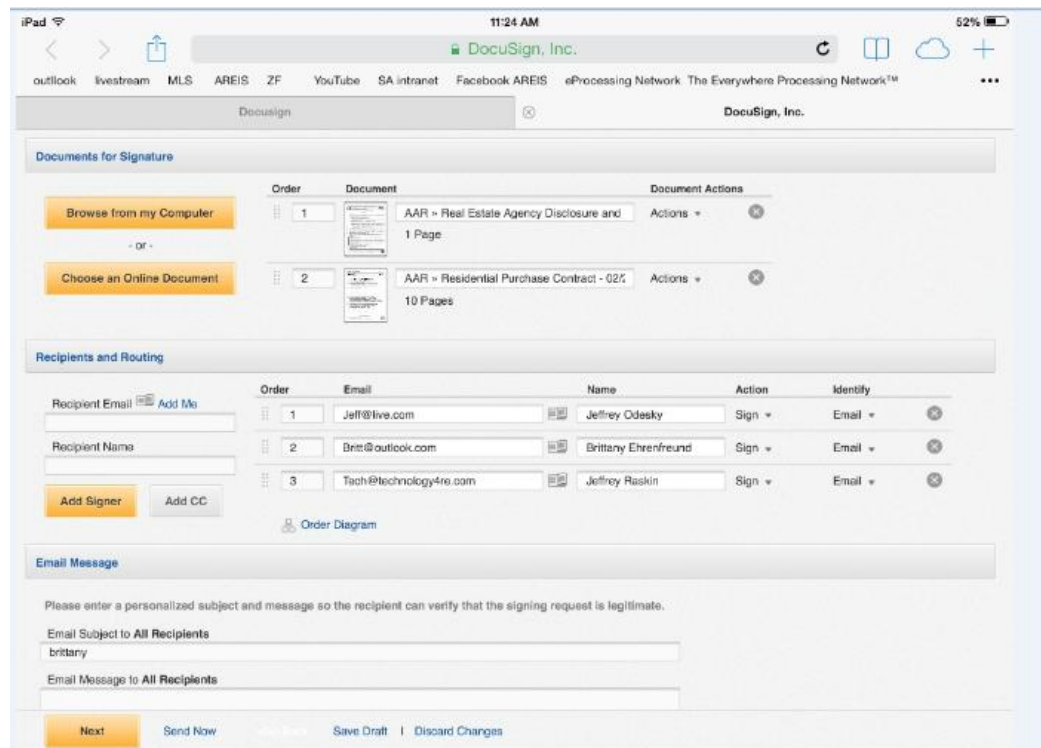
Choose the documents you want, then choose Next



Put the email addresses in, then choose Next



Both the computer and ipad version look identical.



DocuSign (DS) will recognize your zipForm® (ZF) documents since you went directly from ZF into DS. Therefore it will tab them for you with all places that your client has to initial, sign and date. You can also Choose an Online Document and bring in non-zipForm® docs. You will have to manually drag and drop where you want your client to initial, sign or date.

Getting Real “Wet” Signatures

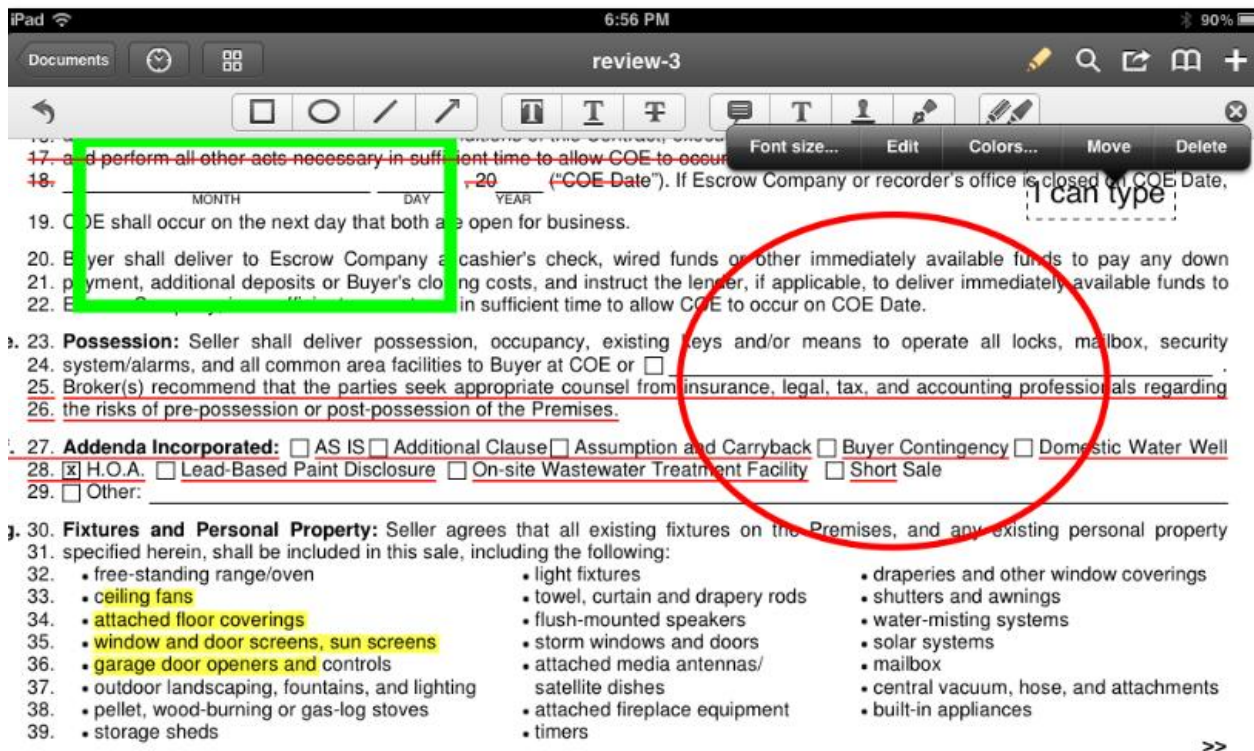
On your PC computer, you will need to go to:
File, Print, Journal Note Writer, Save AS or use a professional version of PDF Writer

On your ipad, you will need to transfer into PDF Expert. Go to the pen, and sign!



Some other amazing things you can do with PDF Expert

- a. Type b. Create shapes c. Underline d. Highlight e. cross-out



1. Even more features by clicking on page icon:



- a. Rotate b. Copy c. Mail d. Extract e. Switch documents around

